

San Bernardino BHMIS Phase I End User Training Agenda

CalPM ADT - DBH Mental Health	
Date:	TBD
Course Instructor:	TBD
Duration:	2.5 days
Super User Attending:	TBD
Location:	TBD
Roles required to complete:	INSERT ROLES HERE
Objective	
Objective: "The objective of this course is to introduce the User to the new Avatar EMR system. This will include basic system navigation how to enter/view data, and defining workflows. This course is intended to focus on the responsibilities and tasks for the DBH Mental Health Providers and Staff."	
DAY 1 DATE Time: 8:00 AM – 4:30 PM	
EST. START/END TIME	TOPIC
8:00 – 8:30	Welcome & Introductions Trainees Logging into Avatar
8:30 – 8:45	Review of Learning Connect Review of Avatar Basics Logging In and Out Navigation of Home View My Forms Clients Widget Navigation of Chart View
8:45 – 9:15	Initial Contact Log Bundle Call Intake Initial Contact Log CSI Assessment (Call Intake) / CSI Assessment Assign Permanent MR#
9:15 – 10:15	Hands on Exercise & Open Discussion Exercise 1 – Create 4 clients using the Initial Contact Log Bundle Exercise 2 – Complete the CSI Assessment (Call Intake) on 2 Clients Exercise 3 – Assign Permanent MR# to your 4 clients
10:15 – 10:30	BREAK
10:30 – 11:00	Admission (Outpatient) – MH Financial MH Registration Bundle Admission (Outpatient) CSI Admission Program Assignment Emergency Contact Information

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11:00 – 11:45	Hands on Exercise & Open Discussion Exercise 4 – Create the MH Financial Episode for each of your clients Exercise 5 – Create the San Bernardino OP Episode for each of your clients
11:45 – 12:15pm	Financial Eligibility Real Time Inquiry 270 Request
12:15 – 1:15	LUNCH
1:15 – 1:45	Hands on Exercise & Open Discussion Exercise 6 – Add the financial eligibility for your 4 clients to the MH Financial Episode Exercise 7 – Link the financial eligibility on the San Bernardino OP Episode to the MH Financial Episode
1:45 – 2:30	MH Admission Bundle CSI Admission Diagnosis Sexual Orientation and Gender Identity (SOGI) Prevention and Early Intervention (PEI)
2:30 – 3:00	Hands on Exercise & Open Discussion Exercise 8 – Complete the admission bundle for your clients on the San Bernardino Op Episode
3:00 – 3:15	Break
3:15 – 3:30	MH Discharge Bundle Program Assignment (Closing) Discharge
3:30 – 3:45	Client Update Bundle Update Client Data Financial Eligibility Client Condition Pregnancy
3:45 – 4:15pm	Review of Registration and Admission Bundles
4:15 – 4:30pm	Hands on Exercise & Open Discussion Exercise 9 – Discharge 1 of your test clients
Day 2 Date 8:00 AM – 4:30 PM	
8:00 – 8:30	Logging in & Questions
8:30 – 9:00	Review of Previous Day
9:00 – 9:30	Ancillary/Ambulatory Services Client Charge Input <ul style="list-style-type: none"> Group Charge Recurring Client Charge Input Edit Service information <ul style="list-style-type: none"> Emergency Indicator Delete Service Practitioner Only Service Delete

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9:30 – 10:15	Hands on Exercise & Open Discussion Exercise 10 – Add a direct service to 1 client and then add an emergency indicator Exercise 11 – Add a Indirect Service
10:15 – 10:30	Client Ledger Simple Report Crystal Report
10:30 – 10:45	Break
10:45 – 11:15	Group Management Group Member Assignment Group Registration Edit Group Registration Date Group Termination Delete Group Termination
11:15 – 11:45	Review of Ancillary/Ambulatory Services
11:45 – 12:00	Hands on Exercise & Open Discussion Exercise 12 – Run the client charge ledger for the client you entered services on
12:00 – 1:00	Lunch
1:00 – 1:30	Hands on Exercise & Open Discussion Exercise 13 – Create a Group
1:30 – 2:15	Client Alerts Scheduling Calendar Add Appointment Find New Appointment Find Existing Appointment Rescheduling of Appointments Editing Appointments Scheduling Group Appointments Appointment Management Appointment Move/Delete Check In Identify Colored Blocks on Scheduler
2:15 – 2:30	Hands on Exercise & Open Discussion Exercise 14 – Schedule one client for an individual appointment
2:30 – 2:45	Break
2:45 – 3:00	Review Scheduling Calendar
3:00 – 4:30	Hands on Exercise & Open Discussion Exercise 15 – Schedule an appointment for the group you created Exercise 16 – Reschedule your group appointment
Day 3 Date 8:00 AM – 12:00 PM	
8:00 – 8:30	Logging in & Questions

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8:30 – 8:45	Review of Previous Day
8:45 – 9:00	Scheduling Reports Print Practitioner Reports Print Appointment Reminder Print Schedule
9:00 – 9:15	Client/Census Management Reports Detail of Admissions by Program Detail of Discharge by Program Master Client Inquiry
9:15 – 9:45	Hands on Exercise & Open Discussion Exercise 17 – Using the client you discharged, document a incoming call using the Initial Contact Log Form, schedule the client for an appointment and enroll them into a new program.
9:45 – 10:00	BREAK
10:00 – 10:30	Crystal Reports MediCal Eligibility Roster (MHS134) Client Face Sheet (MHS140) Reporting Unit Service Summary (MHS142) Missing Social Security Number Staff Caseload Summary (MHS206A) Program Caseload Summary (MHS206B) Medicare Clients with Current Open Episodes (MHS560) Absence of Service Report (MHS119) Client Coverage Status (MHS873) Direct Service Detail Report Input Verification Monthly Client Charges Report (MHS941) Clinic Morning Report (MHS942) Monthly Admit Discharge Summary (MHS941) Patient Financial Information (PFI) Indirect Services Report (PSP104) Client Registration (PSP114) Activity Analysis(PSP117) Program Caseload (PSP121) Service Summary: Direct and Indirect Services Service Entry Performance Report (PSP138) Primary Staff Active Caseload(SBC100)
10:30 – 11:30	Hands on Exercise/Wrap Up Exercise 18 – A new client calls and asks to be seen by in MH OP. It is determined the client is going to be seen by a clinician, so the client needs to be registered and scheduled for a appointment. Run the Facesheet report to review client information. The client then arrives for their appointment, they are checked in and the admission paperwork is completed. Then enter the services the clinician provided to the client.
11:30 – 12:00	Wrap Up Trainer Evaluation MH Assessment

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Specific Training Notes for this Course